CONNECT
Maryland Judiciary

STUDENT TRAINING GUIDE

CONNECT HCM 9.2 Fundamentals

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CONNECTed

NOTES

CONNECT HCM 9.2 Fundamentals

Student Training Guide

Student Name

Instructor(s) Name(s)

Class Date

Go Live Date

Judicial Information Systems
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Help Desk 410-260-1114

Online Training Library: {http://courtnet/connect/index.html}

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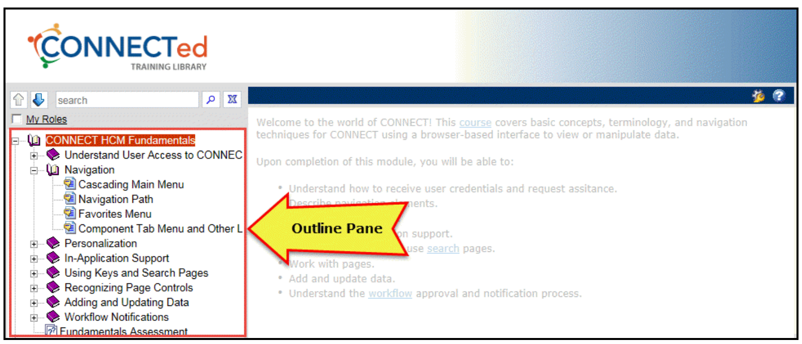
CONNECTed Instructions

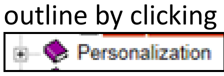
Locating and Launching CONNECTed Training Content

The CONNECTed player is the central area from which you can find and view training content in the form of conceptual information and transactional simulations, with links to other information such as Job Aids, Student Guides, Business Process Maps, and so on. The simulations can be launched in several different modes so you can choose the playback styles that best meet your needs. The last section at the bottom of this page (Play Mode Toolbar) provides a description of each mode that is available from the player.

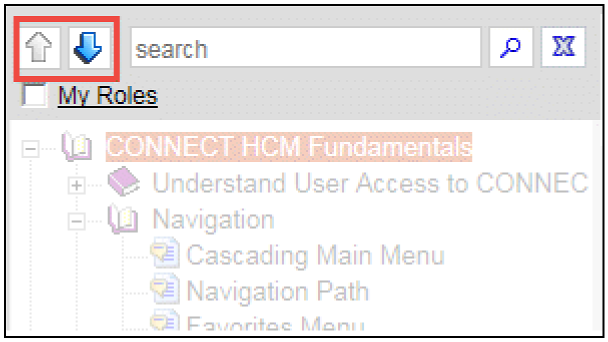
CONNECTed Player Interface Overview



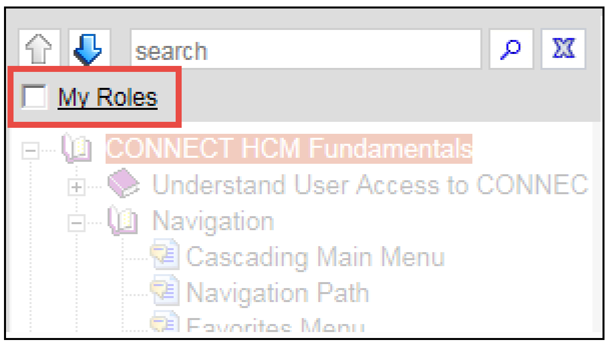
The **Outline Pane** (above) displays the training content on the left side of the player. The outline displays concepts, sections and topics. Sections (purple book icons) organize training topics into logical groupings. Topics (listed within the sections) represent the training simulations you will launch and navigate through to learn the material. There are several methods available to help you find the appropriate content as follows:

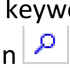
1. **Navigation Controls** (arrows) allow you to navigate up and down the outline. As you use these buttons to navigate, the outline expands as necessary to display the next document or documents depending on the document type. You can also navigate the outline by clicking on the plus (**+**) sign next to the desired section (book icon) 

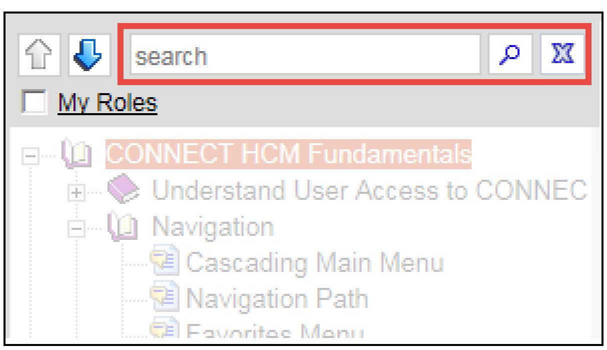
to view all related topics.



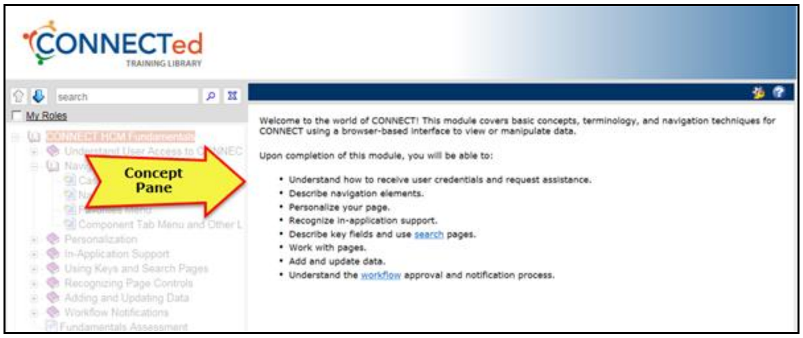
2. **My Roles** allows you to personalize the content outline to show only those topics that apply to a specific role. Click the My Roles link to select the desired role and filter the content.



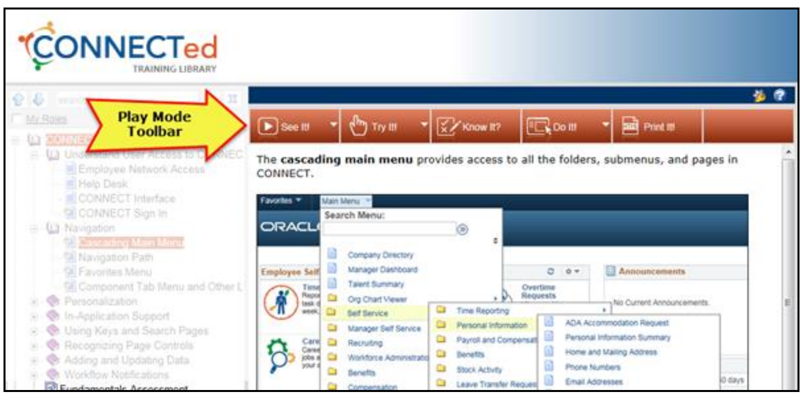
3. The **Search textbox** allows you to locate content quickly instead of navigating the outline. The player performs a full-text search, including any predefined keywords, to locate all content with the indicated word. Click the magnifying glass icon  to search and the  icon to delete the keyword.



The **Concept Pane** (to the right of the outline) displays the conceptual information about the document that is selected in the outline.



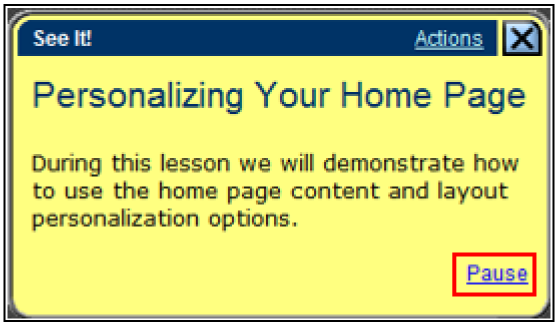
Some topics are informational only which means the simuation modes are not available. You simply read the information displayed in the Concept pane. The other topics that are demonstrated/simulated utilize the play mode toolbar. The **Play Mode Toolbar** appears above the concept pane when a topic is selected in the outline.

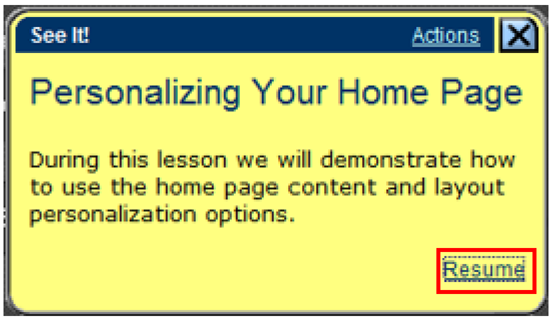


- **See It!** mode enables you to learn about the selected topic by displaying an animated demonstration of a task being completed.
- **Try It!** mode allows you to perform the selected task in a simulated environment.
- **Know It!** mode tests your ability to perform the selected task in a simulated environment.
- **Do It!** mode guides you as you perform the selected task in the live application.
- **Print It!** mode allows you to display an HTML job aid.

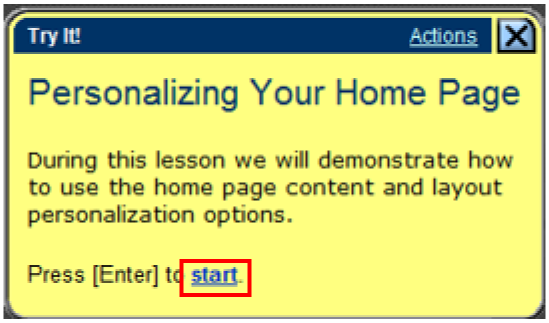
Navigating Through the Content
When you click the desired mode from the Play Mode Toolbar, the simulation opens in your browser.

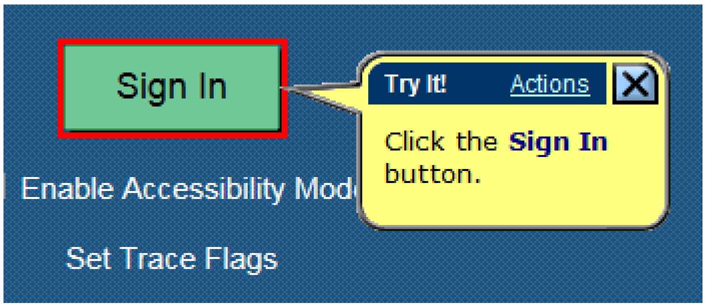
When using "See It", the simulation will automatically begin and transition to the next step every 5 seconds. If you need additional time on a step, you can pause the simulation by clicking the Pause link in the yellow bubble. Once you pause, click Resume to continue the simulation.

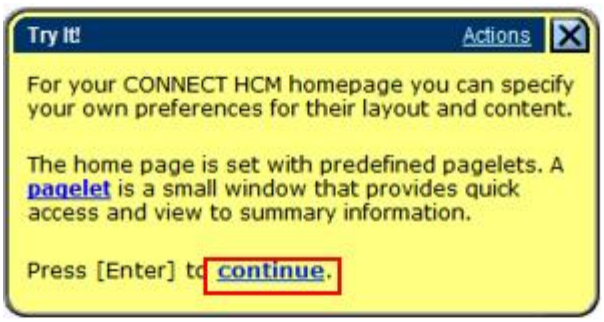




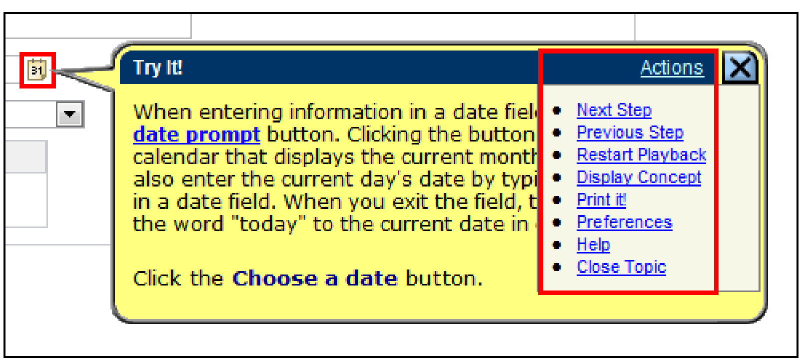
When using "Try It", you must complete the instructions in the bubble before the simulation will advance to the next step. You might be asked to click the "Start" link, click a button, enter data into a field, or click the "Continue" link in order to complete the step and move to the next one.







To navigate between screens in the topic, use the **Actions** menu within the information bubbles. The options are:
Next Step, Previous Step, Restart Playback, Display Concept, Print it!, Preferences, Help, Close Topic



Glossary of Terms
The player contains a built in Glossary that identifies words within the content and will link those words to their definition. Those words are displayed in **blue** and are underlined throughout the training content.

Feedback:
Provide your feedback or questions via email to: connect@mdcourts.gov (mailto:connect@mdcourts.gov) to help us improve training.

CONNECT HCM Fundamentals

Welcome to the world of CONNECT! This module covers basic concepts, terminology, and navigation techniques for CONNECT using a web browser to view or enter data.

Upon completion of this module, you will be able to:

- Understand how to receive user credentials and request assistance.
- Describe navigation elements.
- Personalize your page.
- Recognize in-application support.
- Describe key fields and use search pages.
- Work with pages.
- Add and update data.
- Understand the workflow approval and notification process.

Understand User Access to CONNECT

The Understand User Access to CONNECT lesson introduces you to how access to CONNECT is granted, demonstrates how to sign in to CONNECT, how to request assistance with training and technical support, and an interface definition map.

Upon completion of this lesson, you will be able to:

- Understand Employee Network Access.
- Sign into CONNECT.
- Contact the Help Desk.
- Understand the Interface.

Employee Network Access

Employee Network Access
During your onboarding process your information was gathered and provided to Judicial Information System (JIS), to setup an Active Directory account to provide you with a Judiciary email. CONNECT will leverage this account information to provide you access to the system. Using the first part of your email (firstname.lastname) and email password you will be able to log into the CONNECT system.

If you do not have access or encounter any issues with access to the system you will need to contact the Help Desk.

http://courtnet/connect/ (http://courtnet/connect/)

Help Desk

Contact the Help Desk

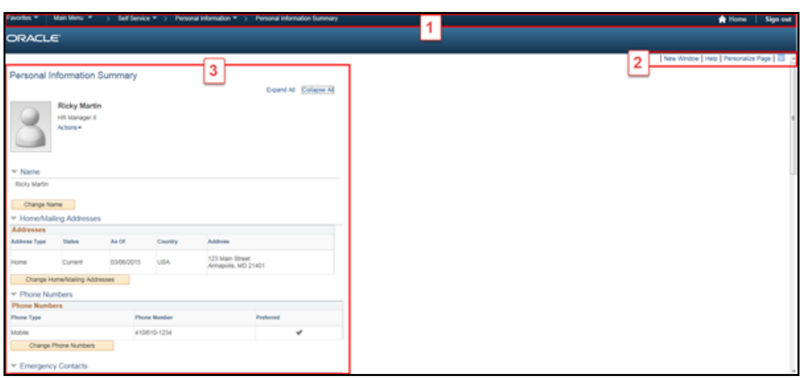
- Call: **410-260-1114**
- Email: **helpdesk@mdcourts.gov** (mailto:helpdesk@mdcourts.gov)

When you call the Help Desk they will open a help desk ticket and include all the information you provide. Make sure to be as detailed as possible with your issue so they can resolve it in a timely manner.

CONNECT Interface

The **CONNECT Interface** is composed of three basic areas:

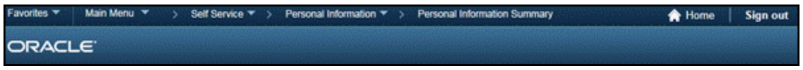
1. Header navigation
2. Links to manage component pages
3. The Component Page area



The **Header Navigation** contains:

- Favorites Menu
- Main Menu

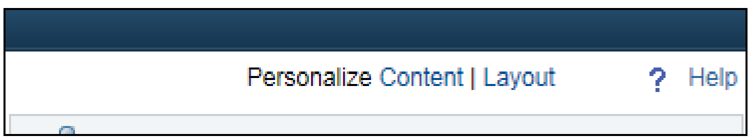
- Navigation Path (when on a component page)
- Home Link
- Sign Out Link



The **links to manage component pages** allow you to:

- open the component in a new window
- access the help content for that component
- personalize the individual component page

- Note: when on the **homepage** or **dashboards** the options will change to Personalize Content and Layout and also include the Help link

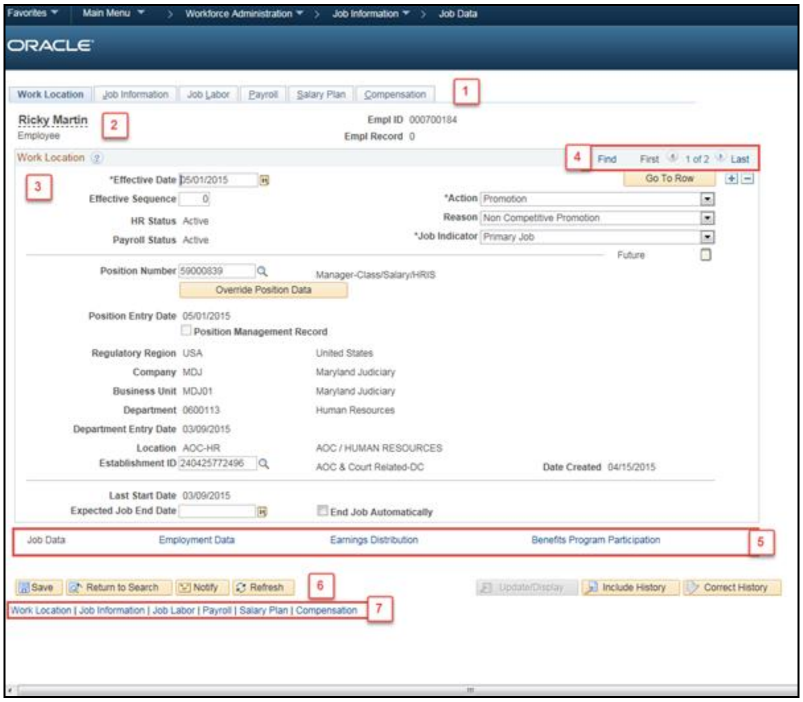


The **component page** is where you will do your transactions. These are the pages that allow you to:

- search the database
- enter/edit/view/save data

Below is an example of a **component page interface**:

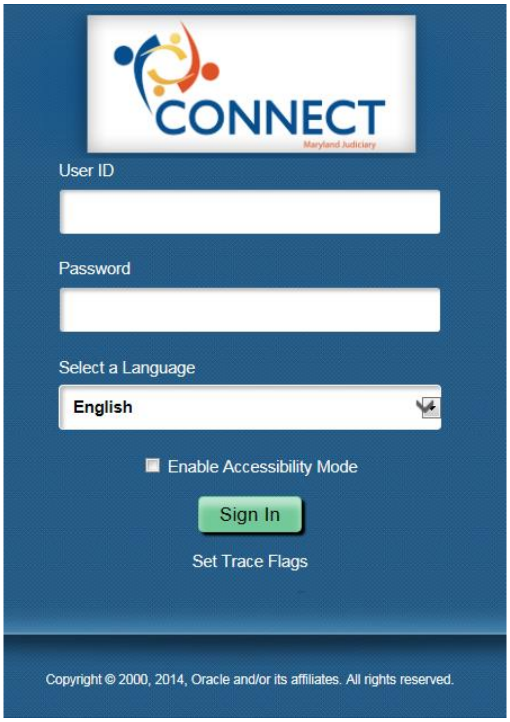
1. Component Navigation Tabs - allows you to navigate to additional sections of a component.
2. Specific Record details - such as employee name, title, employee ID, and record number.
3. Component section (example below is Work Location) and all the associated data fields.
4. Navigation links (First link, Previous Arrow, Next Arrow, Last link) for records associated to the component section.
5. Links to other components related to the current component.
6. Action buttons (if a button is greyed out it is inactive).
7. Footer links for quick access from the bottom of the page to the component sections (same links as the tab menu).



CONNECT Sign In

Signing into CONNECT is just like opening a secured page on a website on the Internet. You enter the URL (Uniform Resource Locator) in your browser window's address box to open the site. When the site opens, you type in your **User ID** and **Password** to access the secured areas.

For CONNECT use the log in credentials that you use when accessing your Judiciary computer. This is called an "Active Directory" account. The typical format for the user name is your FIRSTNAME.LASTNAME.



Procedure

During this topic you will be guided through the process of signing into the CONNECT system.

Step	Action	Notes
1.	When you open your default browser's window and type in the URL for CONNECT or select the bookmark for the page in which you would like to work, the **Sign In** page appears. You use this page to select the language in which you want your transaction pages to appear and to sign in to the application.	
2.	CONNECT's Internet Architecture structure provides "single signon" access, which allows you to work in multiple CONNECT applications and databases without having to sign out and sign in again. Both the **User ID** and **Password** fields are case sensitive. Click in the **User ID** field.	

Step	Action	Notes
3.	For CONNECT use the log in credentials that you use when accessing your Judiciary computer. This is called an "Active Directory" account. The typical format for the user name is your FIRSTNAME.LASTNAME. Enter "ricky.martin" into the User ID field.	
4.	Click in the Password field.	
5.	Once you have typed in the user ID, you can type in the password. Notice that for security purposes, when you type the password, it will be shown with asterisks. Also note that passwords are case sensitive. Enter "welcome1" into the Password field.	
6.	Click the Sign In button. Sign In	
7.	Your HCM Home Page will load the defaulted pagelets with summary information from various sources within the system. This page may vary per user. This is the **Home** page for Enterprise Human Capital Management. For security purposes, your CONNECT system logs you out of your application after a period of inactivity. Two minutes prior to your session timeout, the system provides a warning that your browser session is about to expire.	
8.	To exit CONNECT securely you should always sign out after completing your transaction. Click the **Sign out** link. Sign out	
9.	You have completed the process of signing into the CONNECT system. **End of Procedure.**	

Navigation

The **Navigation** section includes topics demonstrating some of the basic **navigation elements** common to CONNECT.

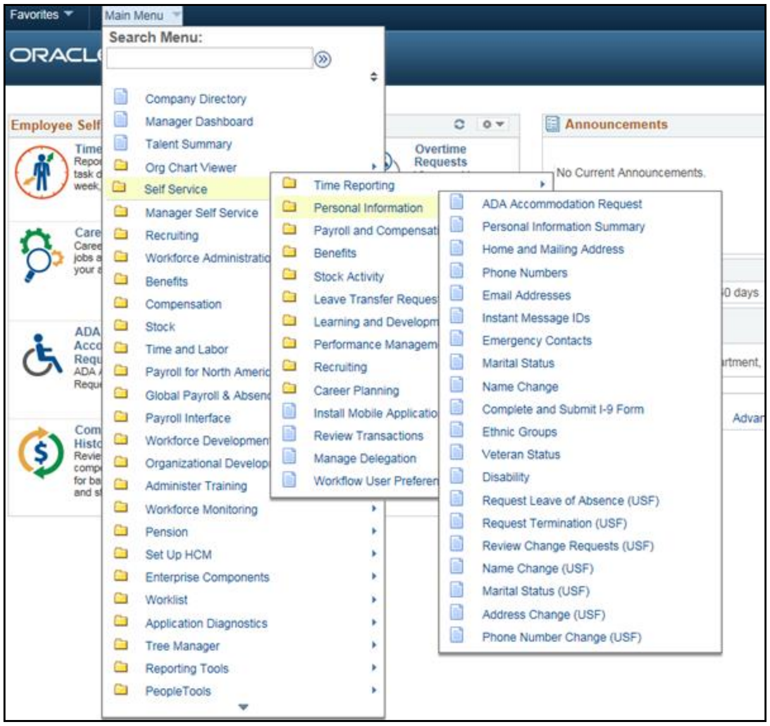
The navigation elements discussed in this topic include:

- Cascading Main Menu
- Navigation Path

- Favorites Menu
- Component Tabs and Other Links

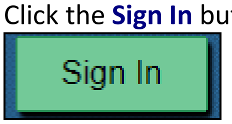
Cascading Main Menu

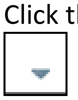
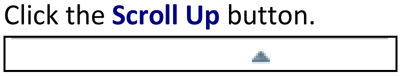
The **cascading main menu** provides access to all the folders, submenus, and pages in CONNECT.

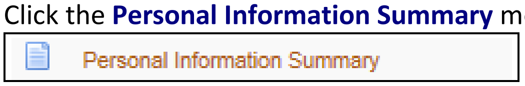


Procedure

During this topic you will be guided through the CONNECT system's cascading main menu.

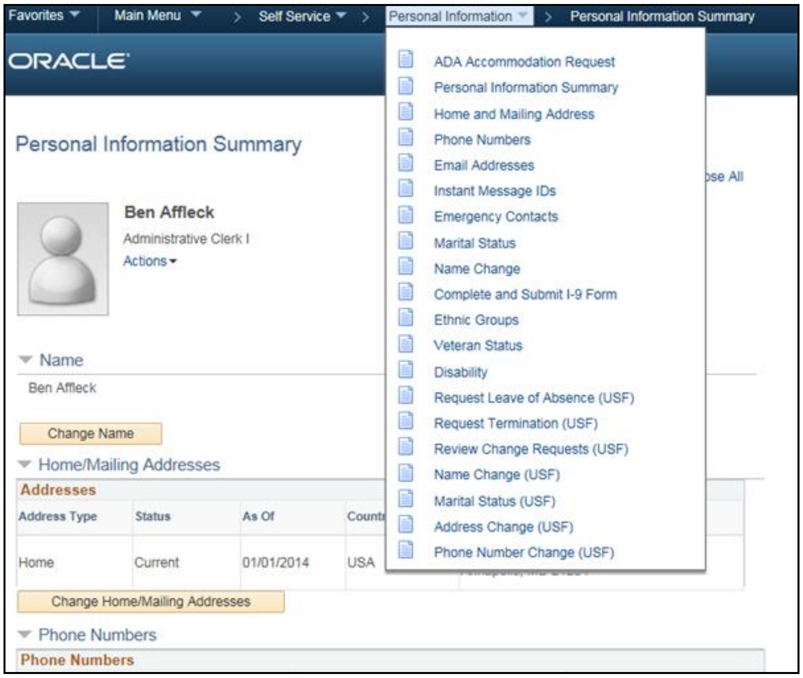
Step	Action	Notes
1.	Click the **Sign In** button. 	

Step	Action	Notes
2.	Mostly, you will navigate to components and pages in the application by using the cascading main menu. To navigate to components and pages, expand the **Main Menu**. For this exercise let's navigate to the **Job Data** component. Click the **Main Menu** button. 	
3.	CONNECT uses **cascading menus** to display a menu structure composed of a hierarchy of folders and content references that you can use to navigate to various application pages. Menu items will vary based on user role security to provide you access to the components you will need to work with.	
4.	User security will determine the items available in the menu and therefore some users will have more menu items than others. If your menu includes more items than it can display an arrow at the bottom will allow you to navigate. To access additional menu items place your mouse over or click the **Bottom** arrow. Click the **Scroll Down** button. 	
5.	Click the **Scroll Down** button again to continue viewing the menu items. 	
6.	Click the **Scroll Up** button. 	
7.	You also have the ability to sort your menu items alphabetically in ascending and descending order. Click the **Sort Menu** button. 	

Step	Action	Notes
8.	Notice how the menu is now sorted in alphabetical and ascending order. Also, notice how the sort button is now pointing up. Click the **Sort Menu** button.	
9.	The **cascading menus** approach is the recommended way of getting around in your CONNECT application. To use the cascading menus, you click each folder leading to the desired destination. Then, when you reach the destination page, click on that link. Click the **Self Service** menu. 	
10.	Click the **Personal Information** menu. 	
11.	Notice that yellow highlighting on the cascaded menus indicates your navigation trail to this point. Click the **Personal Information Summary** menu. 	
12.	Once you land on the page, the page title is displayed at the top. NOTE: some pages may have a different name than the menu item.	
13.	Also, notice the Navigation Path (also known as breadcrumbs) is available at the top.	
14.	Click the **Home** link. 	
15.	Click the **Sign out** link. 	
16.	You have successfully used some of the Cascading Main Menu items to move through CONNECT browser-based application interface. **End of Procedure.**	

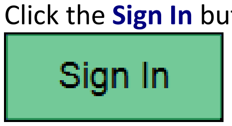
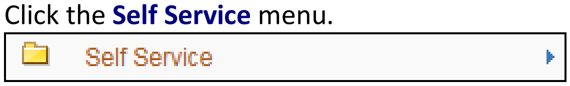
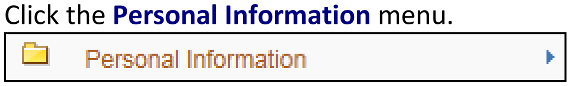
Navigation Path

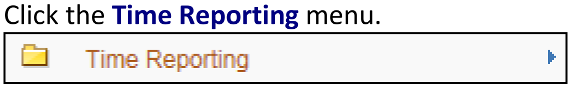
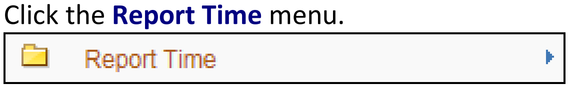
The **navigation path** (also known as breadcrumbs) is located at the top of each page. It provides quick access to other component pages from the current component page without having to start at the Main Menu.



Procedure

During this topic you will learn how the navigation path can help you navigate quickly between a component's sections.

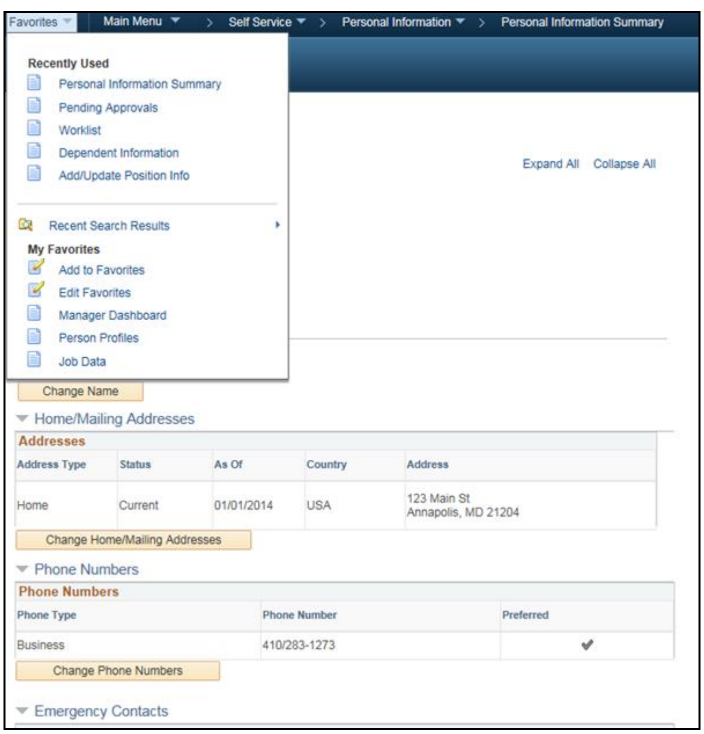
Step	Action	Notes
1.	Click the **Sign In** button. 	
2.	For this topic we will navigate to the Personal Information Summary Page within the Self-Service component. Click the **Main Menu** button. 	
3.	Click the **Self Service** menu. 	
4.	Click the **Personal Information** menu. 	

Step	Action	Notes
5.	Click the **Personal Information Summary** menu. 	
6.	The cascading main menu allows you to navigate from a main folder to a subfolder to a page. Within the main and sub folders we have access to other areas of the main component, which in this example is the Self-Service component for Employee transactions. If you need to navigate to a page within the subfolder Personal Information, then the quickest way is to use the navigation path (also known as breadcrumbs).	
7.	Component folders containing additional sub folders or pages will display a down pointing arrow next to the link in the navigation path. In this example we want to access the Emergency Contacts page. Click the **Personal Information** button. 	
8.	As you can see the navigation path link to Personal Information provides you with quick access to all related pages under that sub folder. Click the **Emergency Contacts** menu. 	
9.	Unlike Personal Information, the Self-Service folder not only includes pages, it also contains sub-folders to other components. Click the **Self Service** button. 	
10.	Notice how in this list of options we have access to various component sub folders and at the bottom some pages. From here we have quick access to, for example, the Time Reporting component which contains the Reporting Time folder which in contains the Timesheet page. Click the **Time Reporting** menu. 	
11.	Click the **Report Time** menu. 	

Step	Action	Notes
12.	Click the **Timesheet** menu. Timesheet	
13.	Notice how the navigation path is updated as we navigate to our final page.	
14.	Click the **Main Menu** button. Main Menu	
15.	You will always have the Main Menu available to navigate to other business areas of CONNECT.	
16.	You have completed reviewing the Navigation Path topic. Click the **Home** link. Home	
17.	Click the **Sign out** link. Sign out	
18.	You have completed the navigation path topic. **End of Procedure.**	

Favorites Menu

CONNECT includes a **Favorites menu** for you to bookmark your commonly used pages and quickly access them without navigating through the folder structure of the main menu.

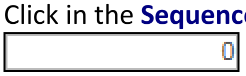
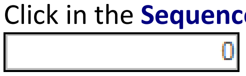
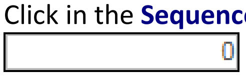
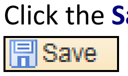


Procedure

During this topic you will learn how to maximize the use of the favorites menu by adding and editing your list of commonly used pages.

Step	Action	Notes
1.	Click the **Sign In** button. Sign In	
2.	Click the **Favorites** button. Favorites	
3.	Use the **Favorites** menu to quickly access (without menu navigation) the last several **Recently Used** pages and any pages that you've added to **My Favorites**.	
4.	Click the **Main Menu** button. Main Menu	
5.	For example if you access the **Manager Dashboard** page often, this page can be added to your Favorites. Navigate to the **Manager Dashboard** page. Click the **Manager Self Service** menu. Manager Self Service	
6.	Click the **Manager Dashboard** menu. Manager Dashboard	
7.	Once the page loads we can add it to our favorites list.	
8.	Click the **Favorites** button. Favorites	
9.	Click the **Add to Favorites** menu. Add to Favorites	

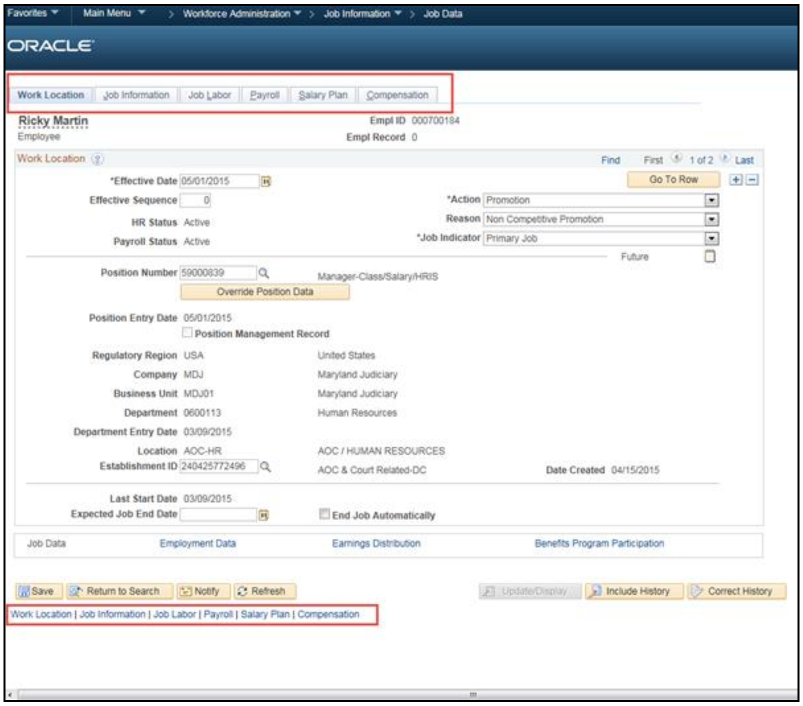
Step	Action	Notes
10.	You may change the description here if you like. For this lesson, we will accept the default. Click in the **Description** field. Manager Dashboard	
11.	Click the **OK** button. OK	
12.	Click the **OK** button. OK	
13.	We will add another page to our favorites. For this example we will navigate to the Person Profile page. Click the **Main Menu** button. Main Menu	
14.	Click the **Workforce Development** button. Workforce Development	
15.	Click the **Profile Management** menu. Profile Management	
16.	Click the **Profiles** menu. Profiles	
17.	Click the **Person Profiles** menu. Person Profiles	
18.	We will repeat the same steps to add Person Profiles to our favorites. Click the **Favorites** button. Favorites	
19.	Click the **Add to Favorites** menu. Add to Favorites	
20.	Click in the **Description** field. Person Profiles	
21.	Click the **OK** button. OK	
22.	Click the **OK** button. OK	

Step	Action	Notes
23.	Let's view our new additions. Click the **Favorites** button. 	
24.	**Manager Dashboard** and **Person Profiles** are now in the My Favorites list.	
25.	Use the **Edit Favorites** page to control the order in which you want your favorites to appear in the **Favorites** menu and to delete favorites. Click the **Edit Favorites** menu. 	
26.	Use **Sequence number** to order your favorites. Click in the **Sequence number** field. 	
27.	Press **[Backspace]** to delete the current data.	
28.	**Manager Dashboard** will be the first in the sequence. Enter "**1**" into the **Sequence number** field.	
29.	Click in the **Sequence number** field. 	
30.	Press **[Backspace]** to delete the current data.	
31.	**Person Profiles** will be second in the sequence. Enter "**2**" into the **Sequence number** field.	
32.	Click in the **Sequence number** field. 	
33.	Press **[Backspace]** to delete the current data.	
34.	**Job Data** will now be third in the sequence. Enter "**3**" into the **Sequence number** field.	
35.	You must save after editing or deleting. Click the **Save** button. 	

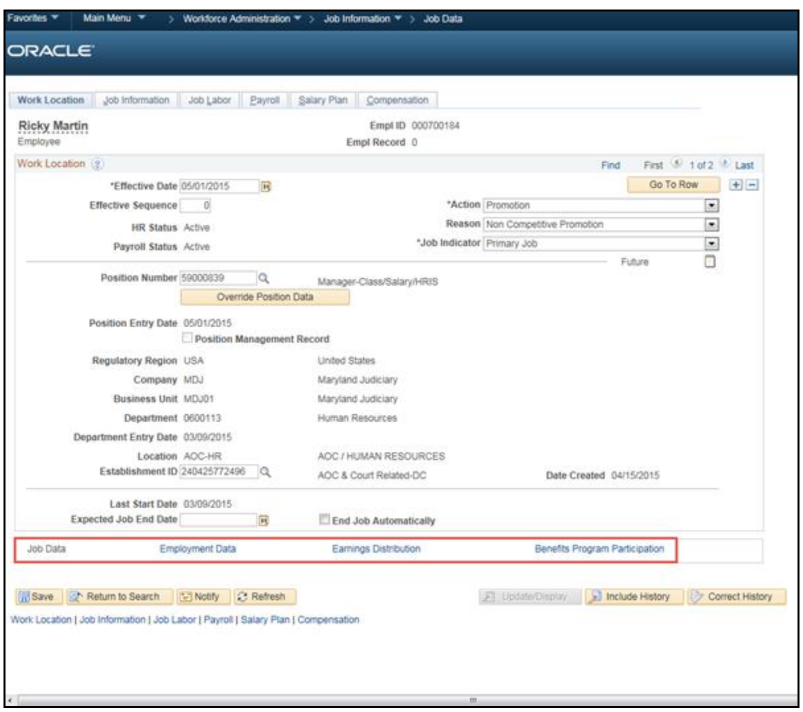
Step	Action	Notes
36.	Clear the page display. Click the **Home** link. 	
37.	Let's view our changes. Click the **Favorites** button. 	
38.	Notice how the order of My Favorites is now in the sequence we created.	
39.	You have completed learning how to add pages to My Favorites list menu. Click the **Sign out** link. 	
40.	Congratulations! You have learned how to add pages to the favorites menu list for quick access to your most used pages in CONNECT. **End of Procedure.**	

Component Tab Menu and Other Links

Component pages may include additional sections which you will navigate using **tab-based menus** as illustrated below.

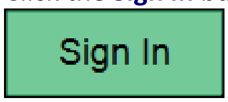
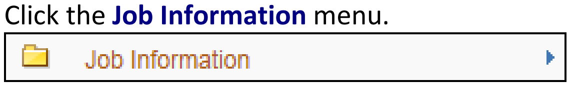
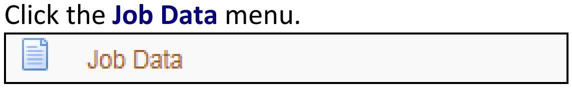
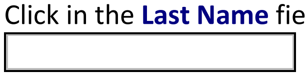
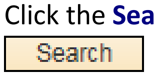


Occasionally you will see pages that, in addition to having links to other sections within the same component, have links to related components or pages. The related component links appear at the bottom of the transaction area as illustrated below.



Procedure

During this lesson we will explain what a component tab menu is all about.

Step	Action	Notes
1.	Click the **Sign In** button. 	
2.	For this example we will navigate to the Job Data page. Click the **Main Menu** button. 	
3.	Click the **Workforce Administration** menu. 	
4.	Click the **Job Information** menu. 	
5.	Click the **Job Data** menu. 	
6.	We will pull an employee record to view the Job Data page details. Click in the **Last Name** field. 	
7.	Enter "**Nayar**" into the **Last Name** field.	
8.	The type ahead provides you with a list of options to choose from based on your entry. Click the **NAYA** object. 	
9.	Click the **Search** button. 	
10.	To enter data in a CONNECT you will first access a component. In this example we are accessing Job Data Components consist of one to several **pages** within the same window. Usually these are pages that are related and need to be completed in succession.	

Step	Action	Notes
11.	To move between the pages, you can select the **folder tabs** or ... Click the **Job Information** tab. Job Information	
12.	... or click the **links** at the bottom of each page.	
13.	Occasionally you will see pages that, in addition to having links to other pages in the component, have links to related components or pages. The related links appear at the bottom of the transaction area above the toolbar. Click any of these links to access that page or component. This convenience enables you to move easily to related transactions for the same key field to enter data without going through the search process again. When you click a component link, you will notice that the new transaction contains the same component links, enabling you to return to the original transaction if desired. The component or page in which you are working appears in black text and is not underlined. Some applications may identify these related links in another way. For example, you might see the phrase "Go to:" along with the related links at the bottom of a page. You might also see a list box with "...More," which contains several more related transaction links.	
14.	You can use the **New Window** link to open a new browser window, or child window. The new window shows the current component page as well as the navigation to your current position. From this window, you can view or enter data. You can open as many child windows as needed using the New Window link. **Do not use** your browser's File > New > Window feature. Doing so copies the current HTML from the parent window, instead of opening a new CONNECT-maintained window session.	
15.	You have completed the component tab menu and other links topic. Click the **Home** link. Home	
16.	Click the **Sign out** link. Sign out	
17.	Congratulations! You have completed the Component Tab Menu and Other Links topic. **End of Procedure.**	

Personalization

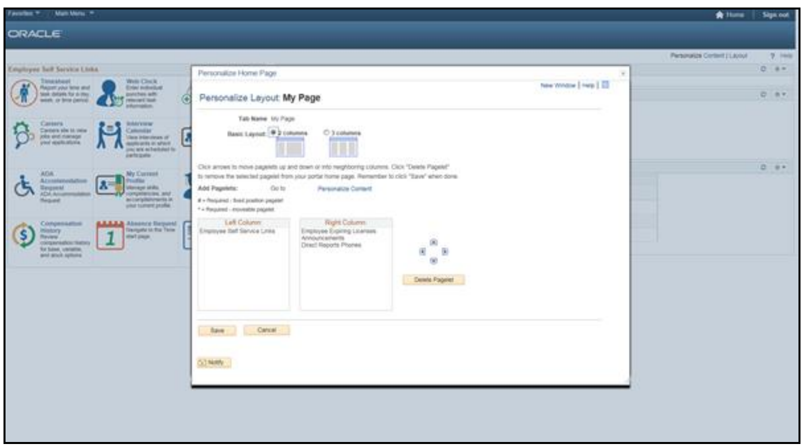
The **Personalization** section provides an overview of home page personalization and demonstrates how to:

- use the Content options.
- use the Layout options.

Personalizing Your Home Page

With the CONNECT portal you can define and store your own **portal homepages** and specify preferences for layout and content. The first time you log in to the CONNECT portal, you will see the default homepage for that portal until you define a personal homepage.

Illustrated below is the HCM homepage.

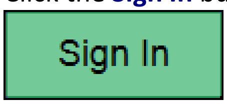


One of the available web page functionalities is providing the user with the ability to rearrange content windows. The following **Video Tutorial:** HOW TO REORGANIZE YOUR HOMEPAGE PAGELETS will demonstrate how to drag and drop content windows (pagelets) to reorganize your homepage. This tutorial is to supplement the full demonstration which is accessible using the Try it! simulation mode.

(Video in MP4 file format will open in your Windows Player application) Watch video on how to drag and drop to move pagelets into different positions within your homepage.

Procedure

During this lesson we will demonstrate how to use the home page content and layout personalization options.

Step	Action	Notes
1.	Click the **Sign In** button.  	
2.	For your CONNECT HCM homepage you can specify your own preferences for their layout and content. The home page is set with predefined pagelets. A **pagelet** is a small window that provides quick access and view to summary information.	
3.	Begin by accessing the Personalize **Content** and **Layout** links to make your changes. Click the **Content** link.  	
4.	Select from the displayed check boxes to choose the pagelets that you want to appear on your personalized homepage. The selection of pagelets is preset by the portal administrator. You can preview each pagelet by clicking the pagelet name. A preview of the pagelet opens in another smaller window. If a pagelet is not available to you, text in the pagelet indicates this. Any links in the pagelet are disabled.	
5.	Select the **Direct Reports** option by clicking the check box. 	
6.	Click the **scroll bar** to view more options.	
7.	Select the **Pending Approvals** option by clicking the check box. 	

Step	Action	Notes
8.	Click the **Save** button. Save	
9.	Each pagelet includes a Refresh button and a Pagelet Settings button, both located on the right side of the pagelet's header.	
10.	The Pagelet Settings button provides the options for **Minimizing, Removing,** or in some cases **Customizing** the individual pagelet. Click the **Pagelet Settings** button.	
11.	For this tutorial we want to temporarily hide the view of the Employee Self Service Links pagelet. Click the **Minimize** link. Minimize	
12.	Click the **scrollbar** to view other options.	
13.	Now that we have the pagelets that provide the information we like to have accessible every time we log into CONNECT, we can arrange them in any order we like. Click the **Layout** link. Layout	
14.	You can select a basic layout of two columns or three columns. A two-column layout results in one narrow column on the left side of your homepage and one wider column to the right. A three-column layout results in three narrow columns of equal width. If you place a wide pagelet in a narrow column, the column stretches to accommodate the wider pagelet. The two pagelets added (Direct Reports and Pending Approvals) are now listed in the first of three columns. To arrange the layout for personal preference, the selections can be moved up, down, and into the center or right columns using the arrows to the right of the columns.	

Step	Action	Notes
15.	You arrange the pagelet by highlighting the name and clicking the arrow keys. You can move a pagelet right or left, from one column to another, and up and down within a column. Click the **Direct Reports** list item. Direct Reports	
16.	Click the **Move Right** button.	
17.	Notice that now Direct Reports is in the Center (second) Column.	
18.	You can reorganize the order within the column. Click the **Move Up** button.	
19.	Click on the move up arrow one more time to make Direct Reports the first one in the column. Click the **Move Up** button.	
20.	Click the **Pending Approvals** pagelet. Pending Approvals	
21.	Click the **Move Right** button.	
22.	Click the **Move Right** button again to move the Pending Approvals to the Right Column.	
23.	Click the **Move Up** button.	
24.	Click the **Employee Expiring Licenses** pagelet. Employee Expiring Licenses	
25.	Click the **Move Left** button.	
26.	Now that you have reorganized your pagelets, save the changes and let's see how the home page looks. Click the **Save** button. Save	
27.	Notice how the pagelets are in different locations.	

Step	Action	Notes
28.	Let's expand the minimized pagelet to view it. Click the **Pagelet Settings** button.	
29.	Click the **Expand** link. Expand	
30.	Now we can view the Employee Self Service Links pagelet. We also have the Employee Expiring Licenses pagelet open but it is not providing any useful information at this time. Let's remove the pagelet from our homepage. But first let's minimize the Employee Self Service Links so we can better see our changes.	
31.	Click the **Minimize** link. Minimize	
32.	Now let's remove the Employee Expiring Licenses pagelet. Click the **Pagelet Settings** button.	
33.	Click the **Remove** link. Remove	
34.	You will always be prompted to confirm removing a pagelet from the homepage. Click the **Yes - Remove** button. Yes - Remove	
35.	Now let's expand the Employee Self Service Links pagelet. Click the **Pagelet Settings** button.	
36.	Click the **Expand** link. Expand	
37.	Now that we have all the pagelets we want on our homepage, let's see how we can use the **Layout** options. Click the **scrollbar.**	
38.	Click the **Layout** link. Layout	

Step	Action	Notes
39.	Notice we have the three column layout selected to display our pagelets.	
40.	To change our layout to two columns we will reorganize our pagelets. Click the **Pending Approvals** list item. Pending Approvals	
41.	Click the **Move Left** button. 	
42.	Click the **Move Up** button. 	
43.	Click the **Move Up** button. 	
44.	Click the **Company Directory** list item. Company Directory	
45.	Click the **Move Left** button. 	
46.	Click the **Delete Pagelet** object. 	
47.	Now let's make the 2 column layout our selection. Select the **2 columns** by clicking the radio button. 2 columns	
48.	Click the **Save** button. Save	
49.	Notice how now we have the two column layout and the pagelets have been reorganized.	
50.	Another quick way to rearrange your pagelets is to use drag and drop with the mouse. Watch Video Tutorial (Video file format: MP4, will open in your Windows Player application) or you may interact with the simulation.	
51.	Notice where the Announcement pagelet is located.	
52.	Click the **Layout** link. Layout	

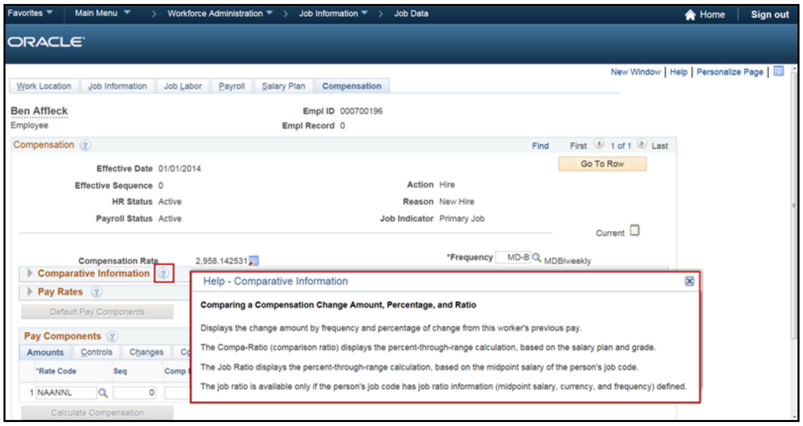
Step	Action	Notes
53.	To delete a pagelet you must select the pagelet first. For this example we will remove the Announcements pagelet. Select the **Announcements** list item. Announcements	
54.	NOTE: This action **will not** be confirmed. If you delete the incorrect pagelet you will need to acces the Content options, select the pagelet, and save to reestablish it on the homepage. Click the **Delete Pagelet** button. Delete Pagelet	
55.	Click the **Save** button. Save	
56.	Notice now the Announcements pagelet is no longer available. Remember you can always reestablish any pagelet by accessing the Personalize Content (top link) options.	
57.	Click the **Sign out** link. Sign out	
58.	You have completed the personalizing your home page lesson. **End of Procedure.**	

In-Application Support

The in-application support refers to the help link and embedded help information available throughout CONNECT.

Embedded Help

Embedded Help is available for some components and page sections and provide additional information.



Procedure

During this topic you will see how to identify and access the embedded help information.

Step	Action	Notes
1.	**Embedded Help** is available for some components and page sections and provide additional information. Click the **Help** button (? icon).	
2.	The embedded help modal prompt opens up and provides you with detailed information on the subject. Click the **Close** button.	
3.	Click the **Job Information** tab. Job Information	
4.	You can find the embedded help icon in the component sections next to the title. Click the **Help** button.	
5.	Click the **Close** button.	
6.	Click the **Home** link. Home	

Step	Action	Notes
7.	Click the **Sign out** link. Sign out	
8.	You have completed reviewing the Embedded Help available throughout the system. **End of Procedure.**	

Using Keys and Search Pages

This lesson provides an overview of **keys** and **search pages**, and describes how to use **search pages** to retrieve the data you need.

Upon completion of this lesson, you will be able to:

- Describe how keys are used to perform a search.
- Perform a search to access a page.
- Use an operator to perform a search.
- Use a wildcard to perform a search.

Understanding Keys

A field or a combination of fields uniquely identifies every table in your CONNECT database. For example, the employee ID field uniquely identifies your employee records. As another example, when employees enroll in training classes, the combination of employee ID, course code, and course start date uniquely identifies enrollment requests.

The fields that uniquely identify your data are called **keys**.

This topic discusses the use of **keys** in CONNECT.

Procedure

During this topic we will identify and explain (data) keys.

Step	Action	Notes
1.	Click the **Workforce Administration** button. Workforce Administration	
2.	Click the **Personal Information** menu. Personal Information	

Step	Action	Notes
3.	Click the **Modify a Person** menu. Modify a Person	
4.	A field or a combination of fields uniquely identifies every row in a table in CONNECT database. For example, a **Person ID** uniquely identifies each row in the **Personal Information** table.	
5.	Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, you are not prompted to enter search criteria again. You are prompted for new search keys only when you select a new page outside of a component with a different search record.	
6.	The fields that uniquely identify your data are called **keys**. To display a page, you enter the search key(s) on the search page so that the system can retrieve the correct row of data. For example, if you want to review a summary of absence history for your employees, you must specify or search for the data by using the **Person ID**.	
7.	A search record is the list of defined search keys that help you locate data. The search keys are the fields you are prompted for on a search page. For example, you can search for an employee by using one or a combination of the keys displayed on this page.	
8.	Click the **Home** link. Home	
9.	Click the **Sign out** link. Sign out	
10.	You have completed reviewing the Understanding Keys topic. **End of Procedure.**	

Using Search Pages

There are two types of **search pages**: basic search pages and advanced search pages. When you select a page, the system often displays a Find an Existing Value tab (or something similar) that enables you to do a basic search and provides an Advanced Search link.

A basic search page enables you to search by just one field at a time, and then only using the “begins with” operator. To designate the search field, if more than one is available, select the desired field from the Search by drop-down list box and then click the Search button to display the results of your search. You can perform a partial search by first entering part of a name or description in the "begins with" text box.

On the advanced search page, you can narrow your search, both by searching based on more than one field at a time and by using a variety of search operators.
In some cases, search pages may include the Include History and Correct History options. In addition, search pages contain the Case Sensitive check box to enable you to perform case-sensitive searches.

When you open a page or component, a search page appears prompting you for the search keys needed to locate the data.

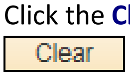
This topic describes how to effectively use search pages.

Procedure

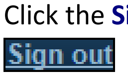
During this topic we will demonstrate the use of search pages.

Step	Action	Notes
1.	Click the **Sign In** button. Sign In	
2.	Click the **Main Menu** button. Main Menu	
3.	Click the **Organizational Development** menu. Organizational Development	
4.	Click the **Position Management** menu. Position Management	
5.	Click the **Maintain Positions/Budgets** menu. Maintain Positions/Budgets	
6.	Click the **Add/Update Position Info** menu. Add/Update Position Info	
7.	When you select a page, the system often displays a **Find an Existing Value** tab that enables you to do a basic search. For this example enter "**59**" into the **Position Number** field.	

Step	Action	Notes
8.	There are two types of search pages: the basic search page and the advanced search page. When you select a page, the system often displays an advanced search page on the **Find an Existing Value** tab. You may also click the **Add a New Value** tab to add a new row of data to the table. Click the **Basic Search** link. Basic Search	
9.	In general, a basic search page offers just one or two fields in which you may perform your search. You designate which key field you want to search with by entering text in the **Search by** field. Click the **Search** button. Search	
10.	A list of Position Numbers that use the **Position** are displayed in the Search Results grid.	
11.	With a basic search, you have the option of changing your search criteria. The **Search by** list box enables you to select different search keys to search against the database. You can also enter full or partial values for the key field. For example, you may not know the Position Number, but you know that the position number begins with a "59". Click the **Search by** list. Position Number	
12.	Click the **Job Code** list item. Job Code	
13.	We know the Job Code we are searching for begin with 63. Enter "**63**" into the **begins with** field.	
14.	Click the **Search** button. Search	
15.	The **Search Results** show all rows matching your search criteria. In this case, these are all the Job Codes in the database with codes that begin with 63. You are looking for the HR Specialist III. With a basic search, only the first column in the Search Results list is displayed as a link. Click the **6344** link. 6344	

Step	Action	Notes
16.	The Position Information page is displayed and includes the Job Code field HR Specialist III.	
17.	Click to scroll down the page.	
18.	If you want to look at data for another job code you can click the **Return to Search** button at the bottom of the page. Click the **Return to Search** button. 	
19.	The system returns you to the advanced search page with the criteria from the previous search displayed. If you want to search again with new criteria, you can use the **Clear** button. The **Clear** button refreshes the page without saving so you can enter new criteria. Click the **Clear** button. 	
20.	The options on the advanced search page enable you to narrow your search by entering values in more than one type of criteria. The advanced search page contains several keys to search for your record. Enter "**59**" into the **Position Number** field.	
21.	Click the **Search** button. 	
22.	The search function can retrieve up to 300 entries from the database, displaying several results at a time in the Search Results grid. Notice we have 213 records in our search results.	
23.	Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right arrow above the grid to view the next set of listings. Click the **Show next rows** link. 	
24.	Click the **Clear** button. 	
25.	Click in the **Business Unit** field. 	
26.	Enter the desired information into the **Business Unit** field. Enter "**m**".	

Step	Action	Notes
27.	Click the **MDJ01** object. MDJ01	
28.	One way you can select criteria is by using the **Lookup** (magnifying glass) buttons provided for some of the fields. Click the **Look up Job Code** button.	
29.	Use the **Look Up modal promt** page to search for key values to use in your search criteria.	
30.	Click the **Cancel** button. Cancel	
31.	Another way to narrow your search is to use a key or combination of keys with full or partial values. For example we have the Business Unit, MDJ01 entered. Let's combine that with entering "**63**" into the **Job Code** field.	
32.	Click the **Search** button. Search	
33.	The 23 job codes that match this criteria are displayed in the **Search Results** table. With an advanced search, all the columns in the Search Results list are displayed as links. Click the **6344** link. 6344	
34.	Click to scroll down the page.	
35.	The Position Information page is displayed. **Search List Navigation** buttons are available to process your search. They are displayed below the transaction area of the page.	
36.	The **Previous in List** button displays the data for the previous data row in your search list box. This button appears gray if you did not select the data row from a list box, if there was only one row in the list, or if the data displayed is the first row on the list.	
37.	The **Next in List** button displays the data for the next data row in your search list box. This button appears gray if you did not select the data row from a list box, if there was only one row in the list, or if the data displayed is the last row on the list.	

Step	Action	Notes
38.	The **Return to Search** button returns you to the search page for the transaction type. Click the **Return to Search** button. 	
39.	If the search criteria you selected is something that you think you can use again, you can save the specifics of the search. Click the **Save Search Criteria** link. 	
40.	The saved search will contain these values field. Click in the **Name of Search:** field. 	
41.	Enter "**Job6344**" into the **Name of Search:** field.	
42.	Click the **Save** button. 	
43.	Click the **Return to Advanced Search** link. 	
44.	Notice that a **Use Saved Search** field appears so that you can select a saved search. Once a search has been saved, that specific search record is available for use in other search pages that use the same search record.	
45.	You can also delete any saved search by using the **Delete Saved Search** link.	
46.	For any of the criteria, you also can use the **Case Sensitive** option. This ensures that the search results are based on matching the case you enter in the criteria.	
47.	Click the **Home** link. 	
48.	Click the **Sign out** link. 	
49.	You have completed reviewing the Using Search Pages topic. **End of Procedure.**	

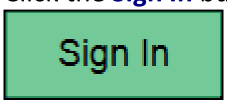
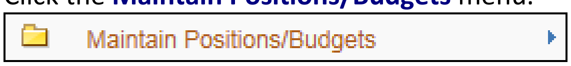
Using Operators and Wildcards

Operators enable you to conduct a search on limited amounts of information, such as first letters for names, descriptions, or IDs.

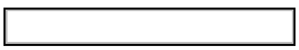
A **wildcard** is a special symbol that stands for one or more characters. This enables you to select multiple files with a single specification.

Procedure

During this topic we will explain how to use operators and wildcards in search pages.

Step	Action	Notes
1.	Click the **Sign In** button.  	
2.	Click the **Main Menu** button.  	
3.	Click the **Organizational Development** menu.  	
4.	Click the scrollbar.  	
5.	Click the **Maintain Positions/Budgets** menu.  	
6.	Click the **Add/Update Position Info** menu.  	
7.	**Operators** enable you to conduct a search on limited amounts of information, such as first letters for names, descriptions, or IDs.	
8.	The fields that uniquely identify your data are called **keys.**	
9.	The advanced search page defaults the operators used for each search key. Notice on the search page displayed that the default for all but one of the search keys is **begins with**. This means that the system searches for records that match, based on the key beginning with the criteria entered in each field.	
10.	Enter "**59**" into the **Position Number** field.	

Step	Action	Notes
11.	In this example, you are searching for a position. You do not know the specific name of the position, but you know that it is an administrative position. If the first word in the position description was "administrative" you could use the "begins with" operator and enter the word "administrative" in the field next to the operator. This would return all positions that begin with the word "administrative." For this example, you do not know where the word falls in the description, so you need to use the "contains" operator. Click the **Description** key list to begins with	
12.	Displayed is a list of all the operators that are available when conducting a search, such as begins with, contains, equals, not equal to, greater than, greater than or equal to, less than, less than or equal to, between, and in. For this example select the **contains** list item. contains	
13.	Click in the **Description** field.	
14.	Enter "**administrative**" into the **Description** field.	
15.	Click the **Search** button. Search	
16.	Your Search Results are displayed below the operators. Notice how the result only displays the positions containing the word "administrative" in the description.	
17.	Click the **Main Menu** link. Main Menu	
18.	Click the **Workforce Administration** menu. Workforce Administration	
19.	Click the **Job Information** menu. Job Information	
20.	Click the **Job Data** menu. Job Data	

Step	Action	Notes
21.	CONNECT supports three wildcard features when searching for data in character fields. These wildcards can be helpful in finding the exact information you want to process. **The supported standard wildcard features:** **%** the percent sign to match one or more characters **_** the underscore to match any single character **** the back slash as an escape character (don't treat the next character as a wildcard)	
22.	For example, suppose you are looking for a specific employee but can't remember his ID. You know that the Name begins with "K". You can use the % wildcard to locate the employee. Click in the **Name** field. 	
23.	Enter "**k%**" into the **Name** field to search for all names beginning with the letter K.	
24.	Click the **Search** button. 	
25.	Click the scrollbar to view all results.	
26.	Notice there are 12 employees with names beginning with the letter K.	
27.	Click the **Home** link. 	
28.	Click the **Sign out** link. 	
29.	You have completed the Using Operators and Wildcards topic. **End of Procedure.**	

Recognizing Page Controls

Page controls include several types of **data entry fields**, designed to offer different ways to enter and maintain information. Recognizing each type of data entry field helps you to use CONNECT more efficiently.

Data Entry Fields

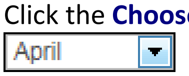
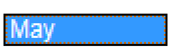
In this topic you will learn to recognize and use the different types of data entry fields such as:

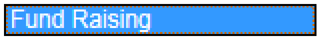
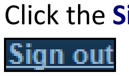
- Edit Box
- Date Prompt
- List Box
- Check Boxes
- Radio Buttons
- Long Edit Box

Procedure

During this topic we will identify and explain data entry fields.

Step	Action	Notes
1.	Click the **Main Menu** button. Main Menu	
2.	Click the **Workforce Administration** menu. Workforce Administration	
3.	Click the **Personal Information** menu. Personal Information	
4.	Click the **Biographical** menu. Biographical	
5.	Click the **Volunteer Activities** menu. Volunteer Activities	
6.	Enter "**00**" into the **Empl ID** field.	
7.	When the **Autocomplete** function is enabled (**My Personalizations**), the system provides a list of **Empl IDs** based on the text you enter in the **Empl ID** field. Click the **sonu nayar** object. sonu nayar	
8.	The system completed the data entry that you selected from the auto complete. Click the **Search** button. Search	
9.	Some fields on a page are required, meaning that you must enter a value in the field before you can save the page. The **asterisks (*)** next to the **Volunteer Organization**, **Start Date**, and **Type of Volunteer** fields indicate that these are required fields.	

Step	Action	Notes
10.	An **edit box with prompt button** uses a **Lookup** button, which looks like a magnifying glass, and can be used to look up a valid value for the field. It opens a separate page that enables you to search the database for the data you need. Click the **Look up Volunteer Organization** button. 	
11.	A **modal prompt** is a child window that requires you to interact with it before you can return to operating the parent application. An example of this is the **Look Up** page. The **Look Up** page displays a list of all the valid values for the field. In this example, the page displays a list of all the volunteer organizations in the database. Click the **Close** button. 	
12.	When entering information in a date field, you can use the **date prompt** button. Clicking the button opens a small calendar that displays the current month and day. You may also enter the current day's date by typing the word "today" in a date field. When you exit the field, the system converts the word "today" to the current date in correct date format. Click the **Choose a date** button. 	
13.	Click the **Choose Month** list. 	
14.	For this exercise, you want to enter a start date of **May 14, 2015**. Select the **May** list item. 	
15.	Click on **14.** 	
16.	Notice that when you selected the day, the system exited the calendar, and entered and the formatted date selected.	
17.	A **list box** is a field similar to an edit box, but with a down arrow within the box. Click the down arrow to display a list of values from which you can select a single option. Click the **Type of Volunteer** list. 	

Step	Action	Notes
18.	For this example, the type of volunteer work is Fund Raising. Click the **Fund Raising** list item. 	
19.	A **check box** is a small square box that turns an option on or off. Select the box to add a check mark and the option is on. Remove the check and the option is off. In this example, the **Is Volunteer on Leave** check box option is off and you want to turn it on. Click the **Is Volunteer on Leave** option. 	
20.	A **radio button** is a small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time.	
21.	Navigate to the **General Comments** page, for example, to see a long edit box. In the navigation path at the top of the page, find the name of the desired menu and click to display the cascade. Click the **Biographical** button. 	
22.	Click the **General Comments** menu. 	
23.	An **edit box** is a rectangular box into which you enter data. The number of characters you can enter is determined by the length of the database field.	
24.	A **Comment** is a field into which you enter lengthy custom text, such as comments. These boxes store free-form text. Notice that when the edit box is empty, no scroll bar appears.	
25.	When you enter more lines than can be displayed at the same time in the default size of the box, the system adds a vertical scroll bar and allows you to continue entering text. Use the scroll bar to move through the text.	
26.	Click the **Home** link. 	
27.	Click the **Sign out** link. 	

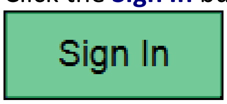
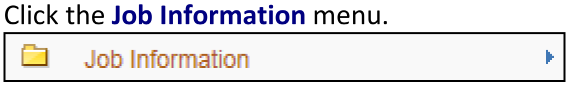
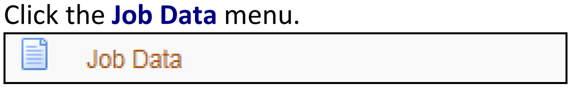
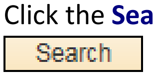
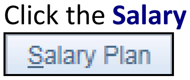
Step	Action	Notes
28.	You have completed the Data Entry Fields topic. **End of Procedure.**	

Action Buttons

In this topic you will learn to recognize action buttons.

Procedure

During this topic you will review action buttons available through out CONNECT.

Step	Action	Notes
1.	Click the **Sign In** button. 	
2.	Click the **Main Menu** button. 	
3.	Click the **Workforce Administration** menu. 	
4.	Click the **Job Information** menu. 	
5.	Click the **Job Data** menu. 	
6.	Action buttons are found across the system and are visually identifiable by their graphic look. On this Job Data page you have the **Search** and **Clear** buttons.	
7.	Click the **Search** button. 	
8.	Within components there are also action buttons. The **Go To Row** button is an example.	
9.	A **plus or minus** (+/-) icons allow you to add and delete data rows.	
10.	Notice the Override Position Data button is greyed out. When an action button is greyed out it is because is the action is unavailable/inactive.	
11.	Click the **Salary Plan** tab. 	

Step	Action	Notes
12.	Below the component we have a set of action buttons: **Save:** saves component data onto the database **Return to Search:** navigational button to the initial search page **Notify:** opens an email form to send to a notification to a selected recipient and may include a link back to the specific location/page. **Refresh:** reloads the page **Update/Display:** enables you to access current and future effective-dated rows in the database **Include History:** use to update certain categories of existing data in the database **Correct History:** used to View, Change, and Insert current and future rows (not accessible to all users) When a button is greyed out it is because it is inactive.	
13.	The **Current** (notepad icon) button allows you to maintain/include notes for the active record.	
14.	The **Look Up** (magnifying glass icon) button allows to pull up a list of options to choose from to input into the specific data field. The **Refresh** (two green arrows icon) button allows for the data to be refreshed/reloaded.	
15.	The **Calendar** (calendar icon) button, **date prompt**, allows to select a date by choosing a month, year, and day.	
16.	On this, Compensation page, there additional action buttons, are in the form of icons: **1. Display in other Currency** icon next to the Compensation Rate. **2. Show all columns/Show tabs** in the Pay Components will change view of data fields within the component. **3. Zoom** (pay) component will open the component in a separate window. **4. Download** (grid with red arrow pointing down) icon allows you to download the data into an Excel worksheet.	
17.	On this, Add/Update Position Information page: **Previous in List:** to view the previous record **Next in List:** to view the next record **Add:** a quick link to add a new record (in this example, to add a New Position)	

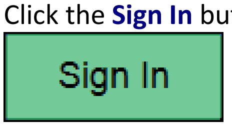
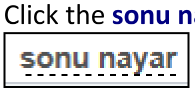
Step	Action	Notes
18.	We navigated to the employee personal information summary page. Here you can see a set of prompt buttons: **Edit:** a pencil icon allows for editing of available information **Delete:** a trash can icon allows for removing rows of information	
19.	Click the **Home** link. 	
20.	Click the **Sign out** link. 	
21.	You have viewed a list of action buttons available through out CONNECT. **End of Procedure.**	

Grid Page Controls for Admins

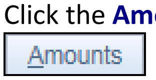
In **grids**, fields appear as columns similar to those on a spreadsheet. Fields in a grid belong to one table in your database. **Grids** enable you to visually distinguish those rows of data at a glance and to add, edit, and view multiple occurrences of data for a group of fields on a page.

Procedure

During this topic we will review some Grid page controls.

Step	Action	Notes
1.	Click the **Sign In** button. 	
2.	For this example we will view the **Contact Address/Phone** page.	
3.	This is an employee Contact Address/Phone page.	
4.	Employee names are displayed with a dashed underline which indicates the availability of a mouse over popup page. Click the **sonu nayar** object. 	

Step	Action	Notes
5.	When you click or mouse over the employee name, additional information about an employee appears in a popup window. The popup window disappears when you move the mouse away.	
6.	The **Other Phone Numbers** page in the **Emergency Contact** component contains a grid area. Click the **Other Phone Numbers** tab. Other Phone Numbers	
7.	On some pages, you may want the fields to repeat in order to enter multiple rows of data. Grids look similar to a spreadsheet with **column headings**, **rows**, and **cells**. The cells are equivalent to fields. Fields within a grid may be represented as edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.	
8.	Rows of data in grids always share the same high-level keys. For example, for the **Other Phone Numbers** page, you can have multiple rows for the different phone types. If you have multiple rows, each of these rows has the same **Person ID** as the key field. If you insert a new row, the system automatically copies the shared key data into the new row.	
9.	Instead of using a traditional scrollbar to scroll through the rows of data in a grid, CONNECT uses navigation buttons and hyperlinks. Most often, you will find these buttons and hyperlinks in the **navigation header** for each area, with the exception of the **Insert Row** and **Delete Row** buttons.	
10.	Use the **Find** link to find a specific row of data.	
11.	Use the **View All** link to display all rows of data on a page. When this feature is enabled, the link changes to read **View 1**, so that you can return to the original setting.	
12.	The **First** link takes you to the first row of data.	
13.	Use the **Previous Row** arrow to navigate to the previous row of data.	
14.	The number system for the rows shows the number of rows you are currently viewing. In this example we **1 of 1** Emergency Contact.	
15.	In the Other Phone Numbers for Emergency Contact, notice the dispay is now **1-3 of 3** phone numbers.	
16.	Use the **Next Row** arrow to navigate to the next row of data.	
17.	The **Last** link takes you to the last row of data.	

Step	Action	Notes
18.	The **Add Row** button inserts a new row of data.	
19.	The **Delete Row** button deletes the current row of data.	
20.	For this example, we navigated to the **Compensation** page in the **Job Data** component for you (see the navigation path at the top of the page for navigation).	
21.	Another type of grid is a **tabbed grid**. These grids provide a means of viewing multiple columns of information without having a horizontal scroll to view them. Here you can see a tabbed grid section. You select a tab to view the additional columns. Click the **Changes** object. 	
22.	Notice that different columns are displayed. Click the **Amounts** object. 	
23.	To add data on this page, you must use **Correct History**. Click the **Correct History** button. 	
24.	Notice that the number system for the rows in the grid navigation header shows 1 of 1.	
25.	To add a new row of data to a grid, you click the **Add Row** button to insert a row just below the row you are on. Each time you add a new row, you are actually adding a new row of data to the database table. Click the **Add a new row** link. 	
26.	A new row is now available. Notice that the number system for the rows in the grid navigation header now shows 1-2 of 2.	
27.	If you want to delete a row, click the **Delete Row** button. Click the **Delete row** link. 	

Step	Action	Notes
28.	The system displays a confirmation message asking if you want to proceed with the deletion. It also reminds you that the row will not be deleted from the database until you save the page; however, the row is automatically removed from the grid. Click the **OK** button. 	
29.	You may also encounter grids that can be collapsed or expanded. By clicking the right pointing arrow in front of the grid heading, you can expand a grid that is hidden from view or collapsed. Click the **Expand section** link. 	
30.	You can collapse the grid by clicking the down arrow in front of the grid heading. Click the **Collapse section** button. 	
31.	Remember to Save the page to apply corrections/changes.	
32.	You have completed this topic. Click the **Home** link. 	
33.	Click the **Sign out** link. 	
34.	You have successfully used the grid page controls with multiple rows of data. **End of Procedure.**	

Grid Page Controls for Employees

In **grids**, fields appear as columns similar to those on a spreadsheet. Fields in a grid belong to one table in your database. **Grids** enable you to visually distinguish those rows of data at a glance and to add, edit, and view multiple occurrences of data for a group of fields on a page.

Procedure

During this topic you will review the grid page controls.

Step	Action	Notes
1.	Click the **Sign In** button.	
2.	To navigate CONNECT you have the cascading Main Menu. For this example let's look at the main menu navigation to the Personal Information Summary page. Click the **Main Menu** button.	
3.	Click the **Self Service** menu.	
4.	Click the **Personal Information** menu.	
5.	This is the path to access the **Personal Information Summary** page using the main menu. This page is part of the Self-Service component for employee transactions.	
6.	On the home page we also include an **Employee Self-Service Links** pagelet for easy access to employee commonly used pages.	
7.	Click the **Personal Information Summary** link.	
8.	**Personal Information Summary** page contains all the personal information available for the employee. This page includes: Name, Home/Mailing Address, Phone Numbers, Emails, etc.	
9.	All section details are displayed by default. To be able to view all section titles we will need to collapse them.	
10.	Click the **Collapse All** link to view section titles only.	
11.	Notice how all the sections are now collapsed and we are able to see them quickly.	
12.	To view the contents of a section click the **Expand section** button.	
13.	Click the **Expand section** link.	
14.	To hide the contents of a section click the **Collapse section** link.	
15.	You can always use the Expand All or Collapse All links.	

Step	Action	Notes
16.	Grids look similar to a spreadsheet with **column headings**, **rows**, and **cells**. The cells are equivalent to fields.	
17.	For this example we will make some changes to the Emergency Contacts. Click the **Change Emergency Contacts** button. Change Emergency Contacts	
18.	Fields within a grid may be represented as edit boxes, list box, check box, and radio button or prompt button (for example: pencil and trash can icons).	
19.	To edit the details of the emergency contact click the **Edit** button. 	
20.	Now in the Emergency Contact Detail page, notice how the information previously provided is displayed. For this example we will make an edit to the phone number.	
21.	Click in the **Phone Number** field. 787/457-4123	
22.	The last digit is incorrect. Press **[Backspace]** to delete.	
23.	Enter "**4**".	
24.	Scroll down to the bottom of the page.	
25.	Click the **Save** button. Save	
26.	Most transactions are processed quickly, but the system will always display a Saving... or Saved message on the top right corner to let you know what is happening.	
27.	A save confirmation message indicates the edit was successfully saved. Click the **OK** button. OK	
28.	For this next example we will add a new emergency contact. Click the **Add Emergency Contact** button. Add Emergency Contact	
29.	Some fields on a page are required, meaning that you must enter a value in the field before you can save the page. The **asterisks (*)** next to the **Contact Name**, **Relationship to Employee**, and **Phone Type** fields indicate that these are required fields.	
30.	Click in the **Contact Name** field.	

Step	Action	Notes
31.	Enter "**Charlie Martin**" into the **Contact Name** field.	
32.	To view and select from the predefined list of options click the **Relationship to Employee** list box. Other	
33.	List menus will display all options available in the system. Click the **Sibling** list item. Sibling	
34.	Click to scroll down to the bottom of the page.	
35.	Click the **Add Phone Number** button. Add Phone Number	
36.	Notice the **Phone Type** field includes an asterick (*) indicating it is a required field. Click the **Phone Type** list menu.	
37.	Click the **Mobile** list item. Mobile	
38.	Click in the **Phone Number** field.	
39.	Enter "**787-743-9438**" into the **Phone Number** field.	
40.	Click the **Save** button. Save	
41.	Click the **OK** button. OK	
42.	Notice now there are two emergency contacts available. You may choose to change the Primary Contact here by selecting the check box and then saving the change. A **check box** is a small square box that turns an option on or off. Select the box to add a check mark and the option is on. Remove the check and the option is off.	
43.	Click the **Save** button. Save	
44.	Click the **Return to Personal Information** link to return to that page. Return to Personal Information	

Step	Action	Notes
45.	We use the navigation path to navigate to the timesheet page. Click the **Self Service** button. 	
46.	Click the **Time Reporting** menu. 	
47.	Click the **Report Time** menu. 	
48.	Click the **Timesheet** menu. 	
49.	There are various types of timesheets and your timesheet may be different than the one used for this example, which is a Punch Time timesheet.	
50.	Notice there are required fields by the use of the asterisk (*). Also, notice the structure of the fields is based on a grid with columns and rows.	
51.	For this week the punch time timesheet provides a Comments, In, Lunch, In, Out, etc. data fields per day of the week. Each day is in its own **data row**.	
52.	Click the **Time Reporting Code** list box. 	
53.	A **list box** is a field similar to an edit box, but with a down arrow within the box. Click the down arrow to display a list of values from which you can select a single option. Click the **Time Reporting Code** list. 	
54.	An **edit box** with prompt button uses a **Lookup** button, which is a magnifying glass icon, and can be used to look up a valid value for the field. It opens a modal prompt window that enables you to search the database for the data you need.	
55.	At the end of each row there are **Add a Row** (+) and **Delete a Row** (-) buttons.	
56.	Click to scroll the page left.	
57.	Click the bar to scroll down to the bottom of the page.	

Step	Action	Notes
58.	Below the timesheet you have view access to the Reported Time Summary, Absence and Exceptions details. Another type of grid is a **component tab menu**. These grids provide a means of viewing multiple columns of information without having a horizontal scroll to view them.	
59.	Click the **Absence** tab. Absence	
60.	Notice that different columns are displayed.	
61.	Anytime there is a question mark (?) next to a section, this is **embedded help**, there is more information avaialble to help you understand what that section is about. Click the **Help** button. ?	
62.	Click the **Close** button.	
63.	Click the **Summary** tab. Summary	
64.	Use the Zoom button to view the section in a separate window. Click the **Zoom Reported Time Summary** link.	
65.	Click the **Return** button. Return	
66.	Click to scroll to the top of the page.	
67.	A dashed underline indicates availability of a mouse over popup page. Click the **Ricky Martin** object. Ricky Martin	
68.	When you click or mouse over the additional information about an employee appears in a popup window. The popup window disappears when you move the mouse away.	
69.	You may have additional actions link that are accessible here. Click the **Actions** link. Actions	

Step	Action	Notes
70.	You have completed the review of Grid Page Controls. Click the **Home** link. 	
71.	Click the **Sign out** link. 	
72.	You have successfully completed the review of Grid Page Controls for Employees. **End of Procedure.**	

Adding and Updating Data

The ability to manipulate existing data within CONNECT is paramount to keeping accurate records. Using effective-dated tables in combination with action types is essential to being able to do this.

Upon completion of this lesson, you will be able to:

- Understand action types.
- Understand effective-dated rows.

Understanding Action Types

Action types are essential to accessing data within CONNECT. The four action types are:

- Add
- Update/Display
- Update/Display All
- Correction

Procedure

During this topic we will review Action Types.

Step	Action	Notes
1.	Imagine the file cabinet graphic below is a CONNECT database. The file cabinet is filled with information categorized by folders. When you use the **Add** action type, you create a new folder, such as file K0G001 below. Susan Jones has just been hired by your organization and has been assigned **Employee ID K0G001**. This ID is now the high-level key used to differentiate Susan Jones from Arnold Jones, who is also employed within the company.	
2.	Susan has now been hired and assigned a CONNECT Employee ID. She has additional personal information to be added to her records. To access her employee file, the action type of **Update/Display** is used. As its name describes, the action **Update/Display** enables you to make updates to existing data or to display current data.	
3.	Three years have passed since Susan was hired. In that time, she has changed jobs, moved twice, and gotten married. You can use the action type **Update/Display All** to view previously entered (historical) data, in addition to current accessible rows using Update/Display.	
4.	It was recently discovered that an error was made when Susan transferred departments. You can use the action type **Correction** to make adjustments to errors in the database. The Correction action type is a powerful tool, and not all users have access to it because of the ability to delete or modify **any** row of data within the database.	
5.	You use four **action types** to work with data in CONNECT. You use **Add** when a new high-level key is required to complete a transaction.	
6.	**Update/Display** is used when retrieving or updating data on non-effective-dated database tables. If the table is effective-dated, you can use this action to view current and future rows; modify future rows only; insert a new current row or future row.	
7.	When you view data using **Update/Display All**, you will view current, future, and history rows of data. This is helpful when you want to view historical data.	
8.	**Correction** is the most powerful of all the actions. You can use it to view, change, or insert rows of data, regardless of the effective date.	
9.	You have completed reviewing the **Action Types** topic. **End of Procedure.**	

Effective-Dated Rows

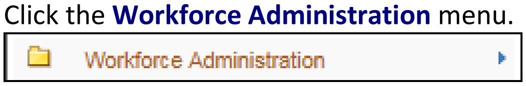
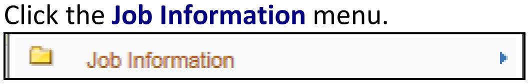
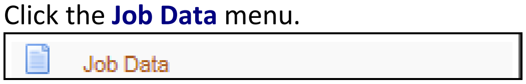
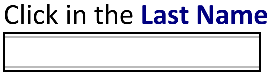
CONNECT uses **effective-dated** rows to retain historical data, view data changes over time, and store future data. Three categories of effective-dated rows are used to accomplish this task:

- Current
- Future
- History

Procedure

During this topic we will review the categories of effective-dated rows.

Step	Action	Notes
1.	Effective dating allows you to store historical data, see changes in your data over time, and enter future data. For example, you may want to track several events in the career of John Smith: when he was hired, transferred, and promoted. By inserting rows of data based on his employee ID, and significant dates, you can build a job history.	
2.	A **current** row of data within CONNECT displays the most up-to-date information available, or what is currently affecting a change to the data. John Smith got married on September 12, 2007. Human Resources inserted a data row in his record that indicated a change of status from single to married, effective September 12, 2007. If you were to access John's record today, the current row would show September 12, 2007. Unless John has a status change in the future, September 12, 2007 will remain his **current data row**.	
3.	**Future** rows of data are categorized as rows of data that have not yet taken effect. They are future transactions. If John had advised Human Resources of his wedding prior to the date of the event, a row could have been inserted with an effective date of September 12, 2007. Until the effective date passed, the row would remain in the system as future. **Future rows** can eliminate paperwork stored for future transactions and avoid potential loss of records.	

Step	Action	Notes
4.	The last category, **History**, is fairly self-explanatory. **History rows** are what current and future rows eventually become. If John's marriage didn't work out and he got divorced, a row would be inserted to his status field indicating a divorce, with an effective date defined by John. The marriage date, which was the current row, would then become the history row. **History rows** enable you to maintain an accurate online history of your data. This data can then be incorporated into reports or viewed online.	
5.	**Actions** determine the rows of an effective-dated table that can be retrieved or modified. The table below displays the categories of effective-dated rows, along with the action types and associated page actions used online to retrieve, insert, or update effective-dated rows. For example, you could click the **Update/Display** button to Retrieve the Current row and Insert a New Effective Date for the birth of John's new baby.	
6.	Now that you have an understanding of row categories, you can view some of them online using CONNECT. Navigate to the **Job Data** page. Click the **Main Menu** button. 	
7.	Click the **Workforce Administration** menu. 	
8.	Click the **Job Information** menu. 	
9.	Click the **Job Data** menu. 	
10.	The search page for the Job Data component is displayed. A search page with **Include History** and **Correct History** check boxes displayed indicates that you are accessing effective-dated data. You can access a history row from the search page or from within the page. If neither history box is selected, the **Update/Display** option is the default.	
11.	Click in the **Last Name** field. 	

Step	Action	Notes
12.	Enter "**martin**" into the **Last Name** field.	
13.	Click the **Search** button. 	
14.	The **Work Location** page of the component is displayed. There are **Effective-Date** field on this page as well as in the **Job Information** page.	
15.	Click the **Job Information** tab. 	
16.	Notice that there are two rows listed for the **Job Information** section. This is the current row of information.	
17.	This employee has changed Job Information and we would like to see the history. Click the **scroll bar** to view the bottom of the page.	
18.	Click the **Include History** action button. 	
19.	Notice that the scroll area now displays 1 of 3 between the scroll arrows.	
20.	You are looking at the **Future** Job Information where a 05/01/2015 future effective date was entered.	
21.	Also, notice Future is indicated for the attach Comments button.	
22.	Click the **Show next row** link. 	
23.	Notice we are now viewing the **Current** Job Information. Notice the Effective Date is 04/01/2015.	
24.	Click the **Show next row** link. 	
25.	Notice how now we are viewing the History (past) Job Information. Notice the **Effective Date** is 03/09/2015.	
26.	You can use the First link to navigate back to the first record. Notice how it is displaying **3 of 3** records. Click the **First** link. 	
27.	Notice we are now in the **1 of 3** records and the **Effective Date** is now 05/01/2015.	

Step	Action	Notes
28.	Click the **Home** link. Home	
29.	Click the **Sign out** link. Sign out	
30.	You have successfully reviewed navigating through effective-dated rows and have seen how they are used within CONNECT. By using effective dates in relation to other fields, you can keep a chronological history of data within the system. **End of Procedure.**	

Workflow Notifications

When data is entered into CONNECT, reviews, approvals, and other activities may be required to complete the business process. **Workflow** enables automated notification and easier management of tasks, or worklist items.

Many of the tasks you perform throughout the day are part of larger tasks that involve several steps and people working together. For example, when you want to take a training course, you request to take a course, your manager approves it, and a training administrator enrolls you.

Workflow routings are notifications to inform other people of the work awaiting them. For example, after the training request is entered, CONNECT automatically notifies the approver that the request has been submitted and is waiting for review and approval. Once the request has been approved, the workflow triggers another automatic notification to the person who needs to enroll the student.

Upon completion of this lesson, you will be able to:

- Send and receive notification via workflow.
- Use approval worklists.

Sending and Receiving Notifications

Notifications are sent automatically as a part of the standard workflow routings. You can also send notifications from most CONNECT components by using the **Notify** button.

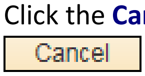
In this topic, you will review how to:

- Send and receive notifications.
- Use worklists.

Procedure

In this topic, you will learn about sending and receiving notification via workflow.

Step	Action	Notes
1.	We will navigate to an employee biographical details for this demonstration. Click the **Main Menu** button. Main Menu	
2.	Click the **Workforce Administration** menu. Workforce Administration	
3.	Click the **Personal Information** menu. Personal Information	
4.	Click the **Biographical** menu. Biographical	
5.	Click the **Modify a Person** menu. Modify a Person	
6.	We will use the Personal Data Search page to look up the employee record. Click in the **Last Name** field.	
7.	Enter "**MARTIN**" into the **Last Name** field.	
8.	Notice the **Autocomplete** function provides a list of available **Last Names** that match the text just keyed.	
9.	Click the **Search** button. Search	
10.	Now in the Modify a person component we can view the **Biographical Details** page.	
11.	Click the **Scroll bar** to view the bottom of the page tab.	

Step	Action	Notes
12.	Notifications can be sent to individuals from most of CONNECT pages. The Notify action button is located at the bottom of the page. The **Notify** button picks up any available Notification Templates for that component. Notifications can be sent via worklist or by email. This action will open a modal prompt. Click the **Notify** button. 	
13.	The **Send Notification** page enables you to notify the person who needs to take action on the notification.	
14.	You can identify the priority level for the notification and the subject or description of the notification.	
15.	The **Template Text** field is based on a predefined notification template and cannot be edited.	
16.	You can include any comments in the **Message** field.	
17.	Click the **Lookup Recipient** link to access the **Lookup Address** page. Enter the first few characters of a recipient's name and click **Search** to see a list of people that match your search.	
18.	**Delivery Options** consist of check boxes that are populated, based on the delivery options defined in the recipient's user profile. The **Worklist** check box is unavailable with external email addresses.	
19.	You may receive workflow notifications through email or worklists. When you receive an email notification, it may include a link to the CONNECT system where you will perform the necessary work.	
20.	Click the **Cancel** button. 	
21.	Click the **Home** link. 	
22.	You have completed reviewing the Sending and Receiving Notifications topic. **End of Procedure.**	

Knowledge Assessment

Question 01

Question
Using this navigation will allow you quick access to other component pages from the current component page.
Response
A. Cascading Main Menu B. Navigation Path C. Component Links D. Tabbed-Menu

Question 02

Question
There are two types of search pages.
Response
A. True B. False

Question 03

Question
Which of the following is not a data entry field?
Response
A. Edit Box B. List Box C. Save Button D. Radio Buttons

The Training Guide PDF document is the complete CONNECT Fundamental training material included in this CONNECTed online training. The digital booklet includes:

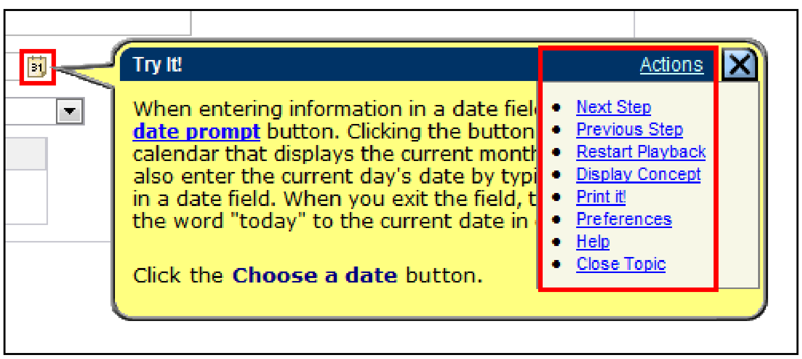
- Cover page
- Notes page
- Classroom training information
- Table of Contents
- Concept page content
- Procedures
- Assessment Questions
- Glossary

Download your PDF copy! (http://mdcourts.gov/connect/connected/training/CONNECT-Fundamentals-Guide.pdf)

Troubleshoot

Usability conflicts when using the CONNECTed Player modes.

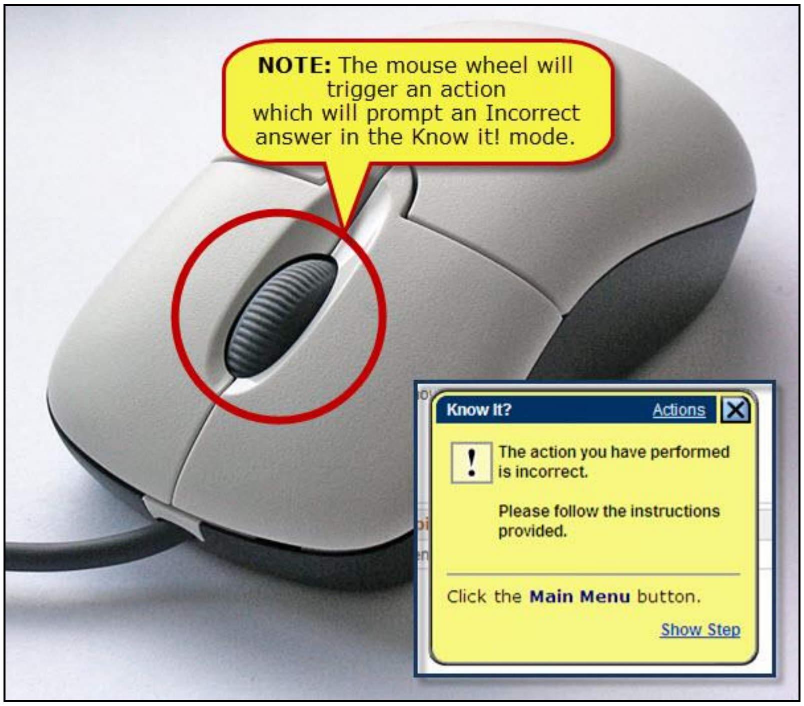
6.4.15 How do I get back to the previous screen?
To navigate between screens in the topic use the **Actions** menu within the information bubbles. The options are:
Next Step, Previous Step, Restart Playback, Display Concept, Print it!, Preferences, Help, Close Topic.



6.4.15 Home page personalization topic - Select and Drag - Try it! mode
Use the video on the concept pane to understand this steps. Also noted inside the bubbled of the simulation step includes instructions to use the [Enter] key to skip through the steps.

6.4.15 Mouse Wheel scroll is "Incorrect"? - Know it! mode
In Know it! player mode, the topic scores you based on the count of Correct "actions" you perform and therefore, deducts points when a wrong "action" or "data" is entered, or triggered by the use of the mouse, or input keys on the keyboard.
Avoid moving the mouse wheel or clicking when using the Know it! mode. Otherwise the action may count as incorrect.

Use the [ESC] key to exit out of the topic and restart.



GLOSSARY

action types	**Action types** are essential to accessing data within CONNECT and include Add, Update/Display, and Correction.
cascading main menu	The cascading main menu provides access to all the folders, submenus, and pages in CONNECT.
check box	A **check box** is a small square box that turns an option on or off.
component	A Component is a collection of pages which are logically grouped.
effective date	A method of dating information in CONNECT. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
list box	A **list box** (also referred to as list menu) is a field similar to an edit box, but with a down arrow within the box which contains a list of options to select.
list menu	A **list box** (also referred to as list menu) is a field similar to an edit box, but with a down arrow within the box which contains a list of options to select.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
Personalizing	**Personalizing** allows you to define and store your own portal homepages and specify preferences for layout and content
portal	The Portal is a single entry point to all of CONNECT business processes areas available to the user based on role security access.
search	**Search** is composed of basic and advance search. Both allow you to look up data based on information provided such as Employee ID or Name, or selecting options from drop-down list boxes.
Sign in	To **Sign in** or **Log in** indicates when the site opens, you type in your **User ID** and **Password** to access the secured areas.
type ahead	**Auto Complete**, also refered to as **Type Ahead**, is system feature to prompt data lookup as you type, suggesting appropriate values from which to choose.
update/display	The **Update/Display** action type enables you to access current and future effective-dated rows in the database.
workflow	**Workflow** enables automated notification and easier management of tasks, or worklist items.